



STATE OF CONNECTICUT
TEACHERS' RETIREMENT BOARD
21 GRAND STREET HARTFORD, CT 06106-1500
Toll-Free 1-800-504-1102 (860) 241-8400 Fax (860) 525-6018 www.ct.gov/trb

DIRECT ROLLOVER/TRUSTEE TO TRUSTEE TRANSFER REQUEST FORM

The Connecticut Teachers' Retirement Board (CTRB) is a qualified plan under Section 401(a) of the Internal Revenue Service Code. CTRB will accept a direct rollover/trustee to trustee transfer of funds from an eligible plan under the following conditions: 1) The member has separated from service or terminated employment or 2) These funds are being used for the purchase of documented Prior Connecticut Teaching Service or Additional Credited Service PROVIDED A FORMAL INVOICE FOR SUCH SERVICE HAS BEEN ISSUED TO THE MEMBER BY CTRB AND THE COMPLETED AND SIGNED INVOICE ACCOMPANIES THIS FORM.

SECTION A: TO BE COMPLETED BY MEMBER

I request a direct rollover/trustee to trustee transfer of my funds in the amount of \$_____ to the Connecticut Teachers' Retirement Board under the terms and regulations of Section 402 of the Internal Revenue Code.

Reason for direct rollover/trustee to trustee transfer (*select one*):

- ☐ I have separated from service or terminated employment. I understand the amount of this direct rollover/trustee to trustee transfer will be deposited into my Voluntary Account with Connecticut Teachers' Retirement Board.
- ☐ I wish to apply these funds towards the purchase of documented Prior Connecticut Teaching Service or Additional Credited Service. I have received a formal invoice from CTRB notifying me of the cost of this service with payment options AND this completed and signed invoice is attached as required. I understand that the amount of this direct rollover/trustee to trustee transfer may not exceed my service purchase cost.

Member's Name		Social Security Number
Mailing Address		Telephone Number ()
Member's Signature	Date Signed	Email Address

SECTION B: TO BE COMPLETED BY CUSTODIAN/TRUSTEE

We approve this request and will transfer the funds as a tax-free exchange under Section 402 of the Internal Revenue Code. The distribution source of this direct rollover/trustee to trustee transfer is (*check one*):

- ☐ Another Qualified Employer Plan I.R.C. 401(a) ☐ Deferred Compensation I.R.C. 457
☐ Profit Sharing Plan I.R.C. 401(k) ☐ Tax Sheltered Annuity (TSA) I.R.C. 403(b)
☐ Individual Retirement Account (IRA) I.R.C. 408

Custodian/Trustee Name	Account Number
Mailing Address	Telephone Number ()
Signature of Representative and Title	Date Signed

Custodian/Trustee should mail this completed form and a check issued as requested to:

State of Connecticut Teachers' Retirement Board
FBO: (Member's Name)
P.O. Box 30173
Hartford, CT 06150